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UNITED STATES DEPARTMENT OF AGRICULTURE
OFFICE OF FOREIGN AGRICULTURAL RELATIONS
WASHINGTON, D. C.

FD-3 June 24, 1946

FOREIGN DAIRY REPORTS [1]
WORLD OUTPUT OF DAIRY PRODUCTS FOR FIRST QUARTER 1946

The output of manufactured dairy products in the first quarter of 1946 in most of the important producing countries of the world fell below that for the same period a year ago. The sustained strong demand for milk and cream for fluid consumption continued to reduce materially the quantity of milk available for manufacturing purposes.

In general, the greatest reduction occurred in the production of butter and canned milk, with less pronounced decreases in cheese and dried milk. Exceptions to this general downward trend in output of manufactured products took place in Denmark and Switzerland where some improvement in milk flow provided more milk for manufacturing. Favorable producing conditions in Argentina resulted in a larger outturn of cheese in this period.

Although first-quarter milk production per cow in the United States was the highest on record for the period, total output was about 2 percent less than in the first quarter of 1945 owing to fewer cows on farms. In Canada, milk production in the January-March quarter of 1946 dropped about 4 percent below that for the same quarter of 1945. The number of dairy cows on farms on December 1, 1945, showed a decline of 1.9 percent below those on the same date in 1944. Milk production per cow actually changed very little as compared with the corresponding quarter of last year so that the reduction in the size of dairy herds may be regarded as the main factor in the reduced milk supply. In Switzerland, lactation in the first quarter of 1946 increased over the same quarter of 1945, as a result of an improved feed situation.

In Argentina, considerable rain fell from mid-January to mid-February. The improvement in pastures was soon reflected in a better milk-flow, which had been running below average for several months. While official figures are lacking, milk production apparently reached higher levels by March, although output in that month probably was about 20 percent under March 1945. Weather conditions in northern New Zealand in the first quarter of 1946 have been unfavorable and pastures have been insufficient to maintain milk production. In Australia, output in the first quarter has been stimulated by an improvement in pastures in the principal dairying districts as a result of rains at the end of January and during February.

Butter production in the first quarter of 1946 continued to decline in most countries. In the United States, the decrease was particularly marked, dropping to 71 percent of that for the first 3 months a year ago. This places output for these months at only 62 percent of the 1934-1938 average. Canada's butter production fell to 82 percent, and it became necessary to reduce the butter ration from 6 to 4 ounces per person per week. In Denmark, where the milk yield was up about 10 percent, butter production showed a corresponding increase, but continued well under prewar levels. An im-

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[1] This series of reports is prepared in the Livestock and Wool Division.

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provement in the feed situation in Switzerland resulted in greater milk output, with butter production showing an increase of 20 percent over the first quarter of 1945. In New Zealand, output continued to run behind last year owing to lack of rain. While total production for this period is not yet available, gradings for export were down to 69 percent of the same quarter a year ago. Production in Argentina, where the proportion of milk diverted to cheese continued at a record level, remained somewhat below that for the first quarter of last year.

Cheese production in the first quarter of 1946 in the United States amounted to 92 percent of output for the same period last year and showed the smallest reductions of any manufactured product in that country. Output of American cheese in these months was considerably smaller than for the same period a year earlier, but that of other varieties made from whole milk was much larger. In Canada, cheese production dropped sharply to only 67 percent of last year, the greatest decline for any country. Production in Switzerland was up 2 percent over the first 3 months of 1945. In Argentina, output continued high, rising 10 percent over the opening quarter a year ago. Gradings for export in New Zealand fell behind those of last year.

Canned-milk production showed a decline in the larger producing countries of the world in the first quarter of 1946. An improvement in production, however, occured in Argentina, with a 17-percent rise over the first 3 months of last year. In Cuba, output jumped to 42 percent above the same period a year ago.

Dried-milk production fell below that of a year ago in most countries with the exception of Switzerland where output rose 28 percent above last year.

Current Conditions Abroad: Ottawa. Milk production in Canada, which for several months has been running behind that of a year earlier, showed some improvement in April. Meanwhile, the consumption of fluid milk has risen rapidly, attributed in large part to the return of servicemen from overseas. Canada recently announced that subsidies on milk for cheese and concentrated milk products have been made higher, retroactive to May 1.

Sydney. Further substantial rains were received in the principal dairying districts of Australia in March and April, and prospects throughout practically all dairy regions are excellent. Generally, there is an abundance of feed and dairy stocks are in good condition.

Wellington. Rains in early March in the Province of Auckland and Hawkes Bay broke the drought which began in October. Further rains in April improves prospects for grass and emergency winter-feed crops. The rains came too late, however, to benefit flush season production.

Copenhagen. Milk production in April and May continued above output a year earlier and pasture conditions remained favorable.

Prepared by Floyd E. Davis and Regina Murray, based largely upon reports from Foreign Service Officers in countries included in summary.

DAIRY PRODUCTS: Output in principal producing and exporting countries, 1st quarter 1946, with comparisons

Country and product	Average 1934-1938	Total 1945	1945 1st quarter	1945 2nd quarter	1945 3rd quarter	1945 4th quarter	1946 1st quarter	First quarter 1946/1945
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	Percent
Butter a/								
United States	1,673,328	b/ 1,368,993	b/ 300,668	454,845	389,265	224,215	212,365	71
Germany	792,000	c/	-	-	-	-	-	-
Australia	d/ 437,032	b/ 305,852	b/ 90,791	47,974	b/ 58,776	b/ 108,311	-	-
Denmark	400,660	291,667	50,705	81,790	90,609	68,563	58,863	116
New Zealand - total	e/ 366,049	331,212	112,553	41,221	50,992	126,446	-	-
Export gradings	f/ 314,753	b/ 276,528	b/ 94,210	b/ 32,928	b/ 35,251	b/ 114,139	65,101	69
Canada	248,119	293,541	36,673	97,405	110,747	48,716	30,085	82
Netherlands	201,000	g/	g/	g/	33,763	20,913	-	-
Sweden	151,309	207,360	40,871	55,192	62,542	48,755	-	-
Eire	89,400	67,737	b/ 2,737	b/ 22,450	b/ 29,305	13,245	2,721	99
Argentina	65,742	b/ 95,859	30,714	24,187	13,926	b/ 27,032	30,373	99
Switzerland	62,170	39,947	6,063	12,103	12,941	8,840	7,275	120
Finland	61,287	h/ 59,524	-	-	-	-	-	-
Belgium	46,179	i/ 40,284	b/i/ 4,092	b/i/ 12,722	i/ 14,215	i/ 9,255	-	-
United Kingdom	44,200	j/ 17,920	j/ 1,500	j/ 10,200	-	-	-	-
Union of South Africa	27,725	34,113	12,682	b/ 9,962	b/ 5,904	5,565	-	-
Cheese k/								
United States	643,234	1,114,754	221,102	373,537	322,657	197,458	203,310	92
Italy l/	523,518	176,368	-	-	-	-	-	-
Netherlands	266,549	g/	g/	g/	40,459	10,324	-	-
New Zealand - total	e/ 201,272	233,063	77,103	33,598	29,996	92,366	-	-
Export gradings	f/ 194,175	b/ 210,916	b/ 77,791	b/ 35,275	b/ 15,691	82,159	69,653	90
Canada	114,699	184,452	8,489	64,891	83,338	27,734	5,652	67
Switzerland	111,729	84,416	8,552	27,890	32,337	15,637	8,708	102
United Kingdom m/	109,000	j/ 56,000	j/ 2,300	j/ 17,000	-	-	-	-
Sweden	71,269	83,994	15,465	26,172	b/ 26,316	16,041	-	-
Denmark	68,820	102,734	-	-	-	-	-	-
Argentina	67,873	b/ 177,992	50,084	43,854	29,903	b/ 54,151	55,358	110
Australia	d/ 49,111	b/ 79,088	18,251	8,981	b/ 17,873	b/ 33,983	-	-
Union of South Africa	10,195	15,041	4,998	b/ 3,966	3,097	2,980	-	-

DAIRY PRODUCTS: Output in principal producing and exporting countries, 1st quarter 1946, with comparisons

Country and product	Average 1934-1938	Total 1945	1945 1st quarter	1945 2nd quarter	1945 3rd quarter	1945 4th quarter	1946 1st quarter	First quarter 1946 / 1945
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	Percent
Canned milk								
United States	2,469,535	b/5,054,508	b/1,079,229	b/1,766,749	b/1,413,595	b/794,935	885,291	82
United Kingdom	378,560	j/ 204,545	j/ 48,900	j/ 137,600	-	-	-	-
Netherlands	304,896	-	-	-	-	-	-	-
Canada	92,377	237,645	38,558	84,330	74,692	40,065	35,153	91
Denmark	40,785	-	-	-	-	-	-	-
Australia	38,867	99,427	25,170	12,223	20,276	41,758	-	-
Cuba	n/ 32,564	24,165	2,997	3,433	9,492	8,243	4,248	142
Argentina	-	b/ 7,684	2,134	1,544	1,074	b/ 2,932	2,491	117
Switzerland	14,198	11,897	1,560	4,432	4,810	1,095	1,413	91
New Zealand	n/ 11,273	20,669	5,921	2,635	2,802	9,311	-	-
Dried milk o/								
United States	n/203,555	b/ 849,660	188,550	b/ 318,550	b/ 217,740	b/124,820	170,200	90
Netherlands	56,438	g/	g/	g/	2,705	1,646	-	-
United Kingdom	33,600	j/ 51,520	j/ 14,900	j/ 33,300	-	-	-	-
Canada	23,488	b/ 48,013	b/ 8,221	b/ 17,054	b/ 15,250	b/ 7,488	7,517	91
New Zealand	p/ 17,429	30,267	9,115	3,706	5,816	11,630	-	-
Australia	16,971	47,286	10,093	7,739	10,939	18,515	-	-
Argentina	q/	11,150	4,290	2,114	1,165	3,581	4,012	94
Belgium	5,500	-	-	-	-	-	-	-
Switzerland	2,381	7,007	860	2,832	2,083	1,232	1,098	128
Denmark	2,205	-	-	-	-	-	-	-

Office of Foreign Agricultural Relations. Compiled from official sources.

a/ Creamery butter. b/ Revised. c/ Total production of all butter is estimated at 880,000,000 pounds in 1945. d/ Production year beginning July. e/ Production year beginning April. f/ Production year beginning August 1. g/ Not available. h/ Estimate. i/ These figures represent controlled production of butter. j/ Unofficial estimates and are subject to revision. k/ Factory cheese. l/ Total cheese and includes cheese made from milk of sheep and goats. m/ Includes farm cheese. n/ Less than a 5-year average. o/ Total dried-whole milk and dried-skim milk for human consumption. p/ For 1938 only. q/ Quantity small.

FOREIGN AGRICULTURE CIRCULAR

OFFICE OF FOREIGN AGRICULTURAL RELATIONS
UNITED STATES DEPARTMENT OF AGRICULTURE
WASHINGTON, D.C.

FD 2-46 December 2, 1946

MILK ESTIMATES FOR CHIEF PRODUCING COUNTRIES

Milk production in 1946 in the important European producing countries, showed a recovery from the low wartime levels, but North American production declined. European production, however, is still about 18 percent less than the prewar output, while that in the United States and Canada is expected to be 15 percent more. In Australia and New Zealand, production in the July 1945-June 1946 season was about 4 percent less than in the preceding season and about 11 percent below the prewar level.

Throughout Europe, pastures generally were better than in 1945 and in most countries there was an increase in cow numbers. Shortage of feed in Belgium and Sweden, and a combination of adverse weather conditions and feed shortages in the United Kingdom, Switzerland, the Netherlands, and Finland limited the increase in production. On the other hand, increased feed supplies in Denmark and France have resulted in increased production and greater output per cow. While production decreased in Canada and the United States, the output per cow was greater as a result of extensive culling of low-producing cows.

In Australia and New Zealand, droughts of considerable severity in the last 2 years have cut production below prewar, although Australian production in 1945-46 was above 1944-45. Rains since September have greatly improved production prospects for 1946-47.

A slight increase in dairy cow numbers in Denmark, together with the resumption of oilcake feeding, though on a smaller scale than prewar, helped to raise milk production in that country above the level of 1945. Although there has been a steady recovery in dairy cow numbers in the Netherlands, pastures in 1946 were retarded by drought during the spring months; as a result production was not much larger than that of 1945. The current annual rate of milk production in Belgium is reported at about 80 percent of prewar, because of a reduction of approximately 10 percent in dairy cow numbers and a slightly reduced yield per cow resulting from feed shortages.

In Switzerland, milk production did not maintain the indicated increase of the early months of this year. The feed supply was considerably reduced as a result of the adverse weather in late summer, particularly in north

central Switzerland, the principal dairying area. Sufficient imports of feed concentrates to supplement rations have also been impossible to obtain. Milk cow numbers in 1946, however, increased slightly over 1945, but are still 10 percent below prewar.

Milk production in the United Kingdom has shown a steady upward trend in 1946. On the basis of 9 months' production in 1946, the year's output is estimated to be approximately 4 percent higher than last year's. This increase is expected to be maintained in the last quarter as larger supplies of millfeeds for dairy cows become available.

In France, increased numbers of cows, greatly improved pasture conditions, and a slight increase in feed supplies have brought about a substantial increase in milk production from 22 billion pounds in 1945 to 24 billion in 1946.

Milk production in Finland is expected to show only about a 7 percent increase over 1945 output. Unfavorable weather conditions and shortage of feed prevented a greater recovery throughout the country. Dairy-cow numbers this year remained about the same as in last year. Sweden's milk production in 1946, while above that of a year ago, did not reach preliminary estimates, largely because of the shortage of feeds, which are being rationed.

Milk production in Australia in 1945-46 was 10.8 billion pounds, compared with 10 billion in 1944-45 and a prewar average of 11.8 billion. Production in 1946-47 is expected to lag behind the preceding season. Although weather conditions were excellent in the principal dairy State of Victoria and output was maintained at a satisfactory level, a serious drought was experienced in all the dairy districts of Queensland and the greater part of the dairying area of New South Wales, causing a decline in production in those important dairy States. Consequently, the cattle population is below normal and is being still further reduced in the drought areas.

Milk production in New Zealand in the 1945-46 season, on the basis of butter-fat production, is estimated at 8.2 billion pounds, compared with 9.6 billion pounds a year earlier. Production in the first half of the calendar year 1946 was greatly reduced by the drought and the liquidation of cows. Since that time, substantial rains aided pasture growth and helped to offset the feed shortage induced by the drought. Consequently, production in 1946-47 should be substantially above 1945-46.

In Canada, there has been a general downward trend in milk production since the beginning of the year. Many low producing milk cows were culled from herds during 1946. This has brought the number of dairy cows down to 2 percent below 1945 numbers. Owing to the reduction in milk cows and also to the shortage of forage in some parts of the Dominion, milk production probably continued smaller than a year earlier throughout the fall months. Output in 1946 probably will be about 16.6 billion pounds, as compared with 17.6 billion pounds in 1945, a decline of a little more than 5 percent.

United States milk production is expected to be about 119 billion pounds, or about 2 percent below the record output of 1945. While production per cow in 1946 reached a new high as the result of well above average pasture conditions and liberal feeding of feed concentrates, this record rate of output was not enough to offset the reduction in cow numbers which occurred during the year. Heavy culling of cows during 1946 has apparently brought about a 4 percent decline in milk-cow numbers from the previous year.

MILK: Preliminary estimates of production in important producing countries, 1946 with comparisons a/

Country	Average 1934-38	1945	Preliminary 1946
	Million pounds	Million pounds	Million pounds
United States	102,590	122,200	119,000
Canada	15,789	17,619	16,600
United Kingdom	18,424	16,194	16,840
Sweden	b/ 10,238	9,685	10,229
Denmark	b/ 11,684	9,447	10,169
Netherlands	b/ 11,180	7,334	7,743
Belgium	6,614	5,100	5,400
France	c/ 30,525	(22,000)	(24,000)
Switzerland	5,717	4,530	4,700
Germany	b/ 53,100	-	-
Finland	5,587	3,042	3,285
Australia d/	11,780	10,053	10,794
New Zealand d/	9,454	9,622	8,184

Compiled from official sources.

a/ Cows' milk

b/ For the years 1933-37.

c/ For the years 1937 and 1938.

d/ Production year ending June 30.

This is one of a series of regularly scheduled reports on world agricultural prospects, approved by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report the committee was composed of Joseph A. Becker, Chairman, C. M. Purves, Elmer A. Reese, Regina M. Murray, Louise E. Butt, and Karen J. Friedmann.

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UNITED STATES DEPARTMENT OF AGRICULTURE
OFFICE OF FOREIGN AGRICULTURAL RELATIONS

FD-2

April 29, 1946

FOREIGN DAIRY REPORTS [1]

FLUID MILK CONSUMPTION HIGHER IN MANY COUNTRIES

Larger quantities of fluid milk were consumed in 1945 than in prewar in nearly all countries where supplies permitted. Smaller quantities remained in most countries for the production of butter and cheese, but the output of dried milk was generally maintained or increased above prewar levels.

The milk supply was short of demand in all but a few countries, and even in these some areas were short. Rationing or restrictions as to use prevailed in most countries. The general shortages of food and a high consumer purchasing power greatly increased the demand for fluid milk. In many countries food rationing caused individuals, who previously consumed little fluid milk, to purchase their allotments and thus to add to the total consumption.

Although the higher level of fluid milk consumption in 1945 is a continuation of the wartime trend, the return of overseas military forces and removal of restriction on milk use in the United States and Canada, greatly increased the consumption of fluid milk and cream. Milk production in 1945 was below prewar levels for all countries where reliable estimates are available, except for the United States and Canada. In these two countries, near-record milk cow numbers and a high output per cow resulted in a record milk production for the year.

On the other hand, production per cow was well below prewar in most other countries because of lack of concentrate feeds. Cow numbers were also smaller in all major countries except the United Kingdom. That country has increased its milking herds during the war, but output per cow is smaller because of a greater dependency upon home-grown feeds.

Notwithstanding the highest average production per cow on record in the United States in 1945, this rate of 4,789 pounds was exceeded in 1945 in Denmark, Switzerland, New Zealand, Sweden, and the United Kingdom.

Considerably smaller quantities of milk have remained for use in the manufacture of butter as a result of the greater consumption of liquid milk and the decline in total milk production in most countries. Compared to prewar the quantities utilized for making butter have been much smaller in the United States, Denmark, Australia, New Zealand, Belgium, United Kingdom, Italy, and Finland. Butter production has, however, been well maintained in Canada and Sweden.

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[1] This series of reports is prepared in the Livestock and Wool Division.

In 1945 more milk than in prewar years was used in the manufacture of cheese in the United States, Canada, Australia, New Zealand, and Denmark. Cheese production was maintained at a high level in order to supply their military forces and also the import requirements of the United Kingdom. On the other hand, for most European countries the quantities going into cheese making were greatly reduced, with the greatest reduction probably occurring in Italy and France.

For canned milk the quantity utilized in the United States in 1945 was nearly double that so used in prewar years. This country had to supply most of the Allied world and also to meet requirements for the military forces. Relatively small quantities of milk, but above prewar, were used for the production of canned milk in Canada, New Zealand, and Australia. The Netherlands was an important exporter of canned milk prior to the war, but relatively small quantities were utilized for that purpose in 1945.

While separate statistics are not shown for milk used in the production of dried whole milk, the quantity used for that purpose in 1945 was maintained or increased above prewar levels. Increased production of this product is reported in the United States, Canada, Australia, United Kingdom, Switzerland, Belgium, and Italy.

The United States and Canada are the only countries showing an increase in the use of whole milk for feed. Most countries, especially in Europe, are utilizing considerably less milk for this purpose.

This report is reprinted from the April 29, 1946 issue of Foreign Crops and Markets and is one of a series of regularly scheduled reports on world agricultural production approved by the Office of Foreign Agricultural Relations Committee on Foreign Crops and Livestock Statistics. For this report the Committee was composed of C. M. Purves, Floyd E. Davis, Regina Murray, and Karen J. Friedman.

MILK: Production and utilization in specified countries, 1945

Country	Production: Milk cows b/	Production: Pro-duction per cow	Production: Milk production	Utilization a/: Fluid milk c/	Utilization a/: Butter	Utilization a/: Cheese	Utilization a/: Canned milk	Utilization a/: Other uses d/	Utilization a/: Feed
	1,000 head	Pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
United States	25,519	4,789	e/ 125,045	58,428	34,184	11,113	8,933	9,086	3,301
Canada	3,998	4,407	17,619	5,724	8,118	2,094	510	377	796
United Kingdom	3,533	5,044	17,822	14,341	650	550	450	531	1,300
Sweden	1,869	5,182	9,685	3,417	4,921	602	-	f/ 40	705
Finland	1,120	2,716	3,042	1,615	1,200	75	0	0	152
Denmark	1,582	5,972	9,447	1,748	6,548	445	-	f/ 99	607
Belgium	783	5,220	4,087	1,100	2,150	172	1	64	600
Switzerland	805	5,637	4,544	2,074	876	838	36	20	700
Italy	2,200	3,150	6,930	2,500	1,200	1,600	58	32	1,540
Australia	2,277	4,355	g/ 9,917	2,006	6,523	792	242	354	-
New Zealand	1,699	5,231	8,888	595	6,117	1,888	-	f/ 113	175

Office of Foreign Agricultural Relations.

a/ Includes farm uses. b/ Includes, for the United States and Canada, cows kept mainly for milk and, for all other countries, cows producing over and above the requirements of the calf. c/ Includes milk used for cream. d/ Includes milk for minor products, waste and balance. e/ Total production is shown. Milk production on farms - 122,219 million pounds. f/ Includes canned milk. g/ Excludes milk fed to calves.

MILK: Production and utilization in specified countries, 1934-1938

Country	Production			Utilization a/					
	Milk cows b/	Production per cow	Milk production	Fluid milk c/	Butter	Cheese	Canned milk	Other uses d/	Feed
	1,000 head	Pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
United States	23,933	4,291	e/ 105,416	43,559	43,729	6,449	4,607	4,333	2,739
Canada	3,816	4,138	15,789	4,645	8,197	1,411	273	472	791
United Kingdom	3,300	5,583	18,424	11,100	2,800	1,008	647	686	2,183
Norway	807	3,660	f/ 2,954	1,124	1,111	489	-	g/ 53	177
Sweden	1,922	5,327	f/ 10,238	3,283	4,145	782	-	g/ - 44	1,984
Finland	1,309	4,268	5,587	2,556	2,735	205	-	-	91
Denmark	1,658	7,047	f/ 11,684	1,433	9,314	331	-	g/ 55	551
Netherlands	1,460	7,658	11,180	2,321	5,536	2,291	-	g/ 520	512
Belgium	967	6,840	6,614	1,411	3,968	441	-	-	794
France	7,856	3,886	h/ 30,525	5,838	9,361	4,281	-	g/ 3,739	7,306
Germany	10,076	5,270	f/ 53,100	16,100	28,100	2,400	-	500	6,000
Switzerland	902	6,697	f/ 6,041	2,125	1,497	1,303	-	g/ 49	1,067
Italy	3,466	3,968	i/ 13,750	3,700	2,700	3,600	24	626	3,100
Austria	j/ 1,210	4,442	f/ 5,375	3,020	1,102	662	-	-	591
Australia	2,545	4,629	k/l/ 11,780	1,612	9,466	444	m/ 258	-	-
New Zealand	1,807	5,232	9,454	532	6,922	1,754	-	g/ 57	189

Office of Foreign Agricultural Relations.

a/ Includes farm uses. b/ Includes, for the United States and Canada, cows kept mainly for milk and, for all other countries, cows producing over and above the requirements of the calf. c/ Includes milk used for cream. d/ Includes milk for minor products, waste and balance. e/ Total production is shown. Milk production on farms - 102,590 million pounds. f/ For the years 1933-1937. g/ Includes canned milk. h/ For the years 1937 and 1938. i/ For the year 1938. j/ For the year 1934. k/ For the years ending June. l/ Excludes milk fed to calves. m/ Includes dried whole milk. n/ Utilization of butterfat converted to milk equivalent on the basis of 4.5 percent fat content.

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FOREIGN AGRICULTURE CIRCULAR

OFFICE OF FOREIGN AGRICULTURAL RELATIONS
UNITED STATES DEPARTMENT OF AGRICULTURE
WASHINGTON, D.C.

FD 1-46 September 16, 1946

WORLD OUTPUT OF DAIRY PRODUCTS, SECOND QUARTER 1946

Led by sharp increases in butter and cheese output in Australia, the production of manufactured dairy products in most surplus-producing countries increased in the second quarter as compared with the same period last year. Despite the upturn in several exporting countries, total output for principal producing countries fell below the second quarter last year. The over-all drop in production is attributed to the fact that New Zealand did not fully recover from unfavorable levels a few months earlier and continued high consumption of fluid milk and cream in the United States and Canada has held down the output of butter, cheese, and canned milk. Smaller milk production in the latter two countries also was a factor in reducing the quantity of products manufactured.

Favorable pasture conditions in western and northern Europe have increased dairy production in this region. Netherlands dairy plants, except for condenseries, were again operating and represent a net gain in the second quarter this year compared with last. Although fluid-milk consumption in the United Kingdom was higher than last year, somewhat larger quantities of milk were available for manufacture because of a greater total milk output.

In Switzerland, the improvement in output indicated in the early months of the year was halted, largely on account of a prolonged spell of cold weather which affected the feed situation in north central Switzerland, the leading dairying region. In Australia, pastoral and agricultural conditions generally were favorable for maintaining dairy production at a good level in this period. Good rains in May and mild temperatures in June in New Zealand were conducive to good pastures, in contrast to drought conditions which covered most of the dairying sections in the early months of 1946.

This is one of a series of Foreign Dairy Reports prepared quarterly in the Livestock and Wool Division. Beginning July 1, 1946, current reports of this kind are issued within a new series designated "Foreign Agricultural Circular" and keyed to indicate the subject matter covered. Previous reports on World Trends in Output of Dairy Products were as follows: Quarterly Summary for 1944 and First Half of 1945, issued Sept. 1, 1945; Third Quarter 1945, issued Dec. 17, 1945; Fourth Quarter 1945, issued Mar. 18, 1946; First Quarter 1946, issued June 24, 1946.

Milk production on farms in the United States in the second quarter of 1946 continued 2 percent below that for the same quarter of 1945, owing to fewer cows. Milk production per cow in this period was the highest on record, but it was not sufficient to raise total milk production above last year's record levels. In Canada, in the second quarter of this year, milk production dropped 3 percent below the output for the corresponding period of 1945. The demand for milk for fluid consumption continued and, in this period, milk going into fluid sales increased about 11 percent over last year.

Butter production in most exporting countries showed increases in the second quarter of 1946 over the corresponding quarter last year, but because of materially smaller production in the United States, Canada, and New Zealand, world production in 1946 is only about 72 percent of prewar output.

The greatest improvement in butter output occurred in Australia where production in the second quarter this year increased 29 percent over last year, largely because of high production in Victoria, the most important dairying State. Production in Australia, however, is still considerably below peak levels of a few years ago. Other countries showing appreciable improvement in butter output in the second quarter are Denmark, Argentina, the Netherlands, and Belgium. Some increase is also believed to have occurred in Sweden, France, Czechoslovakia, and Italy.

Cheese production continued to decline in most countries in the second quarter of 1946. In the United States, cheese production was 6 percent below last year. The output of American cheese continued to lag behind last year's output while that of other varieties of whole milk cheese greatly increased. Canada's production in the second quarter of 1946, amounting to only 78 percent of the same period a year ago, showed the greatest decrease in output of any of the principal cheese-producing countries. In Switzerland, where milk ordinarily used in cheese-making was diverted to butter manufacture, cheese production in this quarter dropped to 95 percent of last year. In Australia, where producing conditions in this quarter were particularly favorable, the cheese output reached record levels.

Canned milk production in the second quarter of 1946 in the important producing countries fell below that for the corresponding period a year ago. In the United States, the canned-milk output, like that of other manufactured dairy products, was affected by the continued heavy uses of fluid milk and cream for direct consumption. In the period, April-June 1946, canned-milk production in the United States dropped to 88 percent of that for the same period of 1945. In Canada, canned milk showed the smallest reduction of any dairy product in this quarter, amounting to 98 percent of last year's output. The greatest increase occurred in Cuba, where production in the second quarter of this year rose 52 percent above the second quarter of 1945, but production is still far behind the record output of 1941. In Argentina, output was 40 percent above last year.

Dried-milk production showed the smallest decrease generally of any dairy product. In the United States, output in the second quarter of 1946 was only 3 percent below the record levels of 1945. Production in Canada for this period was 13 percent above last year. In Argentina, the only other country in which dried-milk production increased in the second quarter of 1946, output was 28 percent above that for the corresponding quarter of 1945.

Current Conditions Abroad: Ottawa. In Ontario, rain is needed to revive pastures. Intermittent showers in Quebec have improved pastures in that Province.

Bern. The supply situation in Switzerland with respect to milk and dairy products is now more difficult than at any time during the war. As a result of this unfavorable situation, rations of milk, butter, and cheese have been reduced to a lower level than at any period during the war.

Buenos Aires. With recent improved moisture conditions on pasture lands and relatively mild weather over all the dairy sections, Argentine milk production should soon be entering on an unusually good spring flow. Excellent grass development is expected beginning about September.

Sydney. Although favorable conditions exist in Victoria and parts of New South Wales for an increase in dairy production in 1946-47 season, an over-all increase for Australia will be limited because of very dry conditions in Queensland and the northern coast of New South Wales.

Wellington. Mild temperatures have made grass growth possible to offset the shortage of winter feed. Continuation of good conditions should allay many of the fears held earlier for next season's production prospects.

Prepared by Floyd E. Davis and Regina Murray, based largely upon reports from Foreign Service Officers in countries included in summary.

DAIRY PRODUCTS: Output in principal producing and exporting countries, 2d quarter 1946, with comparisons

Country and product	Average 1934-38	Total 1945	1945 2d quarter	1945 3d quarter	1945 4th quarter	1946 1st quarter	1946 2d quarter	Second quarter 1946/1945
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	Percent
Butter a/								
United States	1,673,328	b/ 1,368,692	454,845	b/ 388,964	224,215	212,365	324,460	71
Germany	792,000	c/	-	-	-	-	-	-
Australia	d/437,032	305,852	47,974	58,776	108,311	96,614	61,754	129
Denmark	400,660	291,667	81,790	90,609	68,563	b/ 58,422	89,727	110
New Zealand - total	e/366,049	331,212	41,221	50,992	126,446	74,711	-	-
Export gradings	f/314,753	276,528	32,928	35,251	114,139	65,101	18,332	56
Canada	248,119	293,541	97,405	110,747	48,716	30,085	93,468	96
Netherlands	201,000	g/	g/	33,763	20,913	h/ 10,745	h/ 38,942	-
Sweden	151,309	207,360	55,192	62,542	48,755	46,026	-	-
Eire	89,400	b/ 65,510	b/ 22,137	b/ 28,509	12,541	2,721	20,186	91
Argentina	65,742	95,859	24,187	13,926	27,032	b/ 30,216	27,709	114
Switzerland	62,170	39,947	12,103	12,941	8,840	7,275	12,150	100
Finland	61,287	h/ 59,524	-	-	-	-	-	-
Belgium	46,179	b/i/ 40,801	b/i/12,936	b/i/14,414	b/i/9,304	i/ 4,819	i/ 14,654	113
United Kingdom	44,200	b/ 18,100	b/ 9,856	5,466	1,613	3,181	10,573	107
Union of South Africa	27,725	34,113	9,962	5,904	5,565	11,902	-	-
Cheese j/								
United States	643,234	b/ 1,114,927	373,537	b/ 322,830	197,458	203,310	352,740	94
Italy k/	523,518	176,368	-	-	-	-	-	-
Netherlands	266,549	g/	g/	40,459	10,324	h/ 4,682	h/ 35,794	-
New Zealand - total	e/201,272	233,063	33,598	29,996	92,366	65,382	-	-
Export gradings	f/194,175	b/ 208,651	b/ 33,010	15,691	82,159	69,653	30,092	91
Canada	114,699	184,452	64,891	83,338	27,734	5,652	50,734	78
Switzerland	111,729	84,416	27,890	32,337	15,637	8,708	26,554	95
United Kingdom l/	109,000	b/ 49,863	b/ 16,173	26,029	5,376	5,914	18,861	117
Sweden	71,269	83,994	26,172	26,316	16,041	83,994	-	-
Denmark	68,820	102,734	-	-	-	-	-	-
Argentina	67,873	177,992	43,854	29,903	54,151	b/ 55,429	48,413	110
Australia	d/ 49,111	79,088	8,981	17,873	33,983	22,875	16,773	186
Union of South Africa	10,195	15,041	3,966	3,097	2,980	5,062	-	-

DAIRY PRODUCTS: Output in principal producing and exporting countries, 2d quarter 1946, with comparisons

Country and product	Average 1934-38	Total 1945	1945 2d quarter	1945 3d quarter	1945 4th quarter	1946 1st quarter	1946 2d quarter	Second quarter 1946 / 1945
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	Percent
Canned Milk								
United States m/	2,469,535	b/ 5,087,826	b/ 1,766,469	b/ 1,431,516	b/ 813,642	b/ 886,675	1,551,990	88
United Kingdom	378,560	b/ 194,522	b/ 122,214	31,898	13,977	28,762	92,199	75
Netherlands	304,896	-	-	-	-	-	-	-
Canada m/	92,377	237,645	84,330	74,692	40,065	35,153	83,093	98
Denmark	40,785	-	-	-	-	-	-	-
Australia	38,867	99,427	12,223	20,276	41,758	-	-	-
Cuba	n/ 32,564	24,165	3,433	9,492	8,243	4,248	5,230	152
Argentina	-	7,684	1,544	1,074	2,932	2,491	2,158	140
Switzerland	14,198	11,897	4,432	4,810	1,095	1,413	5,889	133
New Zealand	n/ 11,273	20,669	2,635	2,802	9,311	7,050	-	-
Dried milk o/								
United States	n/ 203,555	b/ 861,628	b/ 323,689	b/ 220,849	b/ 124,647	b/ 172,030	315,240	97
Netherlands	56,438	g/	g/	2,705	1,646	h/ 97	h/ 19,034	-
United Kingdom	33,600	59,584	b/ 30,733	13,439	1,702	7,169	25,894	84
Canada	23,488	48,013	17,054	15,250	7,488	7,517	19,328	113
New Zealand	p/ 17,429	30,267	3,706	5,816	11,630	7,854	-	-
Australia	16,971	47,286	7,739	10,939	18,515	-	-	-
Argentina	q/	11,150	2,114	1,165	3,581	b/ 3,876	2,708	128
Belgium	5,500	1,738	726	564	303	120	-	-
Switzerland	2,381	7,007	2,832	2,083	1,232	1,098	2,214	78
Denmark	2,205	-	-	-	-	-	-	-

Office of Foreign Agricultural Relations. Compiled from official sources.

a/ Creamery butter. b/ Revised. c/ Total production of all butter is estimated at 880 million pounds in 1945. d/ Production year beginning July. e/ Production year beginning April. f/ Marketing year beginning August. g/ Not available. h/ Estimated. i/ These figures represent controlled production of butter. j/ Factory cheese. k/ Total cheese, and includes cheese made from milk of sheep and goats. l/ Includes farm cheese. m/ Both bulk and case goods. n/ Less than a 5-year average. o/ Total dried-whole milk and dried-skim milk for human consumption. p/ For 1938 only. q/ Quantity small.

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March 18, 1946

FOREIGN DAIRY REPORTS 1/

WORLD OUTPUT OF DAIRY PRODUCTS FOR FOURTH QUARTER 1945

Further declines in the output of manufactured dairy products in most important producing countries were experienced in the final months of 1945, and fourth quarter production was well below that for the same period last year. Quantities of milk moving into fluid consumption continued high, with that available for manufacture correspondingly reduced. The principal exceptions to the trend were the production increases over a year ago of butter in Denmark and Switzerland, and of cheese in Argentina.

Supplies of dairy products in all producing countries are in strong demand and are considerably short of what markets would absorb. The decline in output of manufactured dairy products in the United States and Canada in the final quarter of 1945 made it difficult to meet requirements for liberated countries and deficit producing areas. This situation will continue well into 1946, as the seasonal upturn in supplies will come later than usual because of heavy demands for fluid milk and cream.

Output of milk and dairy products in western Europe is showing some improvement, but recovery is being retarded by current shortage of feedstuffs. In the United Kingdom, for the final quarter of 1945, milk sales for liquid consumption reached 3,152 million pounds, compared to 3,024 million pounds in the same period of 1944. The quantity used for manufacturing was 106 million pounds, compared to 72.

Butter production in the final quarter of 1945 was at the lowest level for any of the principal dairy products, both in relation to output in 1944 and in prewar years. Production was especially low in the United States and Canada. In the principal Southern Hemisphere countries output was below last year and was adversely affected by drought in the Union of South Africa. In Argentina, continued diversion of milk to cheese-making caused butter production to remain below a year earlier. Output of butter in Australia in the first half (July-December) of the new season was about 1 percent below that of the same period a year earlier. Butter export gradings in New Zealand were about [illegible] percent less than a year earlier, with actual production down about 4 percent, as supplies going to United States armed forces were not included in export grading in earlier months of 1945 and in 1944. No purchases were made by the United States armed forces in the fourth quarter of 1945, and this freed quantities to go into export grading.

Butter production in Denmark and Switzerland showed increases of 10 and 12 percent, respectively, in the fourth quarter of 1945 over a year earlier. Further improvement is expected in 1946, with output likely to be about 75 percent of prewar in Denmark and 70 percent in Switzerland.

Cheese production in Canada dropped sharply in the final quarter of 1945, amounting to only 82 percent of the same period a year earlier. The only other marked change occurred in Argentina, where cheese output in the flush months of October-December jumped to 10 percent above the high output

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1/ This series of reports is prepared in the Livestock and Wool Division.

for the same period a year earlier. Argentine production for the whole of 1945 was 12 percent above 1944 and better than 2-1/2 times the prewar output. Cheese production in Australia in the first 6 months of the 1945-46 season advanced about 4 percent over the same period a year earlier. In Italy quarterly figures of cheese production are not available, but reports show that 1945 output was 8 percent below 1944 and about 66 percent less than prewar levels.

Canned-milk production in the principal-producing countries showed a decline during the fourth quarter of 1945 with the drop being especially large in the United States, as condenseries found the fluid milk and cream markets more remunerative. Sharp declines occurred in Argentina and Switzerland, where milk is being used for other purposes.

Dried-milk production fell off during the fourth quarter in line with the decline in butter output and the increased utilization of milk in fluid form. Declines ranging from 10 to 13 percent below a year earlier occurred in the United States, Canada, and Argentina. Because of higher butter output in Switzerland, dried-milk production increased by 14 percent.

Current Conditions Abroad: Ottawa. On account of the continued diversion of milk to fluid consumption, butter output in Canada for the first 2 months of 1946 has declined 17 percent from a year earlier and cheese has dropped 32 percent.

Buenos Aires: Milk production in Argentina has been running below average for several months, although recent rains have improved grazing conditions. This should result in an improved fall output. The proportion of milk diverted to cheese continues at a record level, and prices are strong. The impact of European demand has driven casein prices above the equivalent of the United States ceiling price, and unsold supplies are short.

Wellington. New Zealand export gradings of butter in January 1946 were 13 percent below a year earlier and cheese was 4 percent less than in 1945. Dry weather continuos in Auckland and Wellington Provinces, with rapid decrease in production.

Sydney. As of mid-February, conditions throughout the dairying districts of Australia were generally satisfactory. In the latter half of January good rains fell in all States except western Australia, and brought relief from the dry and hot conditions prevailing in most sections in December and the first half of January. More rain is needed, however, in central and south coast dairying districts of New South Wales. Total milk production for the period July through December was slightly below a year earlier, but the output of butter and cheese for the year ending June 30 is expected to compare favorably with the previous year.

Habana. Pasture conditions in Cuba are now somewhat better than a year ago, and it is likely that 1946 will see an increase in output of dairy products for the first time since 1941.

Prepared by Floyd E. Davis and Regina Murray, based largely upon reports from foreign service officers in countries included in summary.

DAIRY PRODUCTS: Output in principal producing and exporting countries, 4th quarter (calendar) 1945, with comparisons

Country and product	Average 1934-1938	Total 1944	Total 1945	1944 4th quarter	1945 1st quarter	1945 2nd quarter	1945 3rd quarter	1945 4th quarter	4th quarter 1945/1944
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	Percent
Butter a/									
United States	1,673,328	b/ 1,488,552	1,369,323	b/ 274,424	b/ 300,998	b/ 454,845	389,265	224,215	82
Germany	792,000	-	-	-	-	-	-	-	-
Australia	c/ 437,032	314,439	- 305,721	107,693	90,686	47,974	58,791	108,270	100
Denmark	400,660	283,952	291,667	62,390	50,705	81,790	90,609	68,563	110
New Zealand - total	d/ 366,049	318,649	-	134,041	112,553	41,221	-	-	-
Export gradings	e/ 314,753	b/ 252,537	276,047	b/ 114,861	94,192	32,460	35,253	114,142	99
Canada	248,119	b/ 298,777	293,541	b/ 53,317	b/ 36,673	b/ 97,405	b/ 110,747	48,716	91
Netherlands	201,000	-	-	-	-	-	-	-	-
Sweden	151,309	192,471	-	42,469	40,871	55,192	-	-	-
Eire	89,400	64,848	-	11,425	2,645	f/ 19,943	29,306	-	-
Argentina	65,742	104,694	95,972	28,572	30,714	24,187	b/ 13,926	27,145	95
Switzerland	62,170	b/ 39,596	39,947	7,858	6,063	12,103	12,941	8,840	112
Finland	61,287	g/	-	-	-	-	-	-	-
Belgium	46,179	41,041	-	h/ 8,137	h/ 4,144	h/ 12,628	h/ 14,215	-	-
United Kingdom i/	44,200	22,400	-	1,000	1,500	10,200	-	-	-
Union of South Africa	27,725	38,600	-	10,328	12,682	9,638	6,433	-	-
Cheese j/									
United States	643,234	b/ 1,014,900	1 114,754	b/ 203,168	b/ 221,102	373,537	322,657	197,458	97
Italy k/	523,518	191,800	176,368	-	-	-	-	-	-
Netherlands	266,549	-	-	-	-	-	-	-	-
New Zealand - total	d/ 201,272	216,052	-	96,163	77,103	33,598	-	-	-
Export gradings	e/ 194,175	b/ 196,789	210,932	b/ 84,264	77,795	35,289	15,689	82,159	98
Canada	114,699	b/ 180,007	184,452	b/ 33,682	b/ 8,489	b/ 64,891	b/ 83,338	27,734	82
Switzerland	111,729	b/ 84,460	84,416	15,885	8,552	27,890	32,337	15,637	98
United Kingdom i/l/	109,000	40,300	-	3,200	2,300	17,000	-	-	-
Sweden	71,269	65,971	-	11,076	15,465	26,172	9,195	-	-
Denmark	68,820	85,979	-	12,125	-	-	-	-	-
Argentina	67,873	159,302	178,052	49,489	50,084	43,854	b/ 29,903	54,211	110
Australia	c/ 49,111	77,382	79,096	31,906	18,251	b/ 8,981	b/ 17,877	33,987	106
Union of South Africa	10,195	14,731	-	4,796	4,998	3,711	-	-	-

DAIRY PRODUCTS: Output in principal producing and exporting countries, 4th quarter (calendar) 1945, with comparisons

Country and product	Average 1934-1938	Total 1944	Total 1945	1944 4th quarter	1945 1st quarter	1945 2nd quarter	1945 3rd quarter	1945 4th quarter	4th quarter 1945/1944
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	Percent
Canned milk									
United States	2,469,535	4,508,460	5,116,253	377,208	1,085,994	1,777,046	1,459,344	793,869	90
United Kingdom i/	378,560	247,000	-	9,800	48,900	137,600	-	-	-
Netherlands	304,896	-	-	-	-	-	-	-	-
Canada	92,377	b/ 224,743	237,645	b/ 41,843	b/ 38,558	b/ 84,330	b/ 74,692	40,065	96
Denmark	40,785	-	-	-	-	-	-	-	-
Australia	38,867	100,747	-	39,558	25,170	12,223	b/ 20,276	-	-
Cuba	m/ 32,564	29,621	24,165	8,487	2,997	3,433	b/ 9,492	8,243	97
Argentina	-	11,226	7,497	3,311	2,134	1,544	b/ 1,074	2,745	83
Switzerland	14,198	b/ 14,042	11,897	1,903	1,560	4,432	4,810	1,095	58
New Zealand	m/ 11,273	18,241	-	7,530	5,921	2,635	2,802	-	-
Dried milk n/									
United States	m/ 203,555	760,393	848,765	137,092	188,550	317,675	219,000	123,540	90
Netherlands	56,438	-	-	-	-	-	-	-	-
United Kingdom i/	33,600	51,100	-	2,400	14,900	33,300	-	-	-
Canada	23,488	b/ 45,700	50,276	b/ 8,522	b/ 8,607	b/ 17,987	b/ 16,072	7,610	89
New Zealand	o/ 17,429	27,388	-	11,694	9,115	3,706	5,816	-	-
Australia	16,971	45,981	-	18,246	10,093	7,739	10,939	-	-
Argentina	p/	9,892	11,150	4,098	4,290	2,114	1,165	3,581	87
Belgium	5,500	f/ 2,344	-	-	-	-	-	-	-
Switzerland	2,381	8,238	7,007	1,078	860	2,832	2,083	1,232	114
Denmark	2,205	-	-	-	-	-	-	-	-

Office of Foreign Agricultural Relations. Compiled from official sources.

a/ Creamery butter. b/ Revised. c/ Production year beginning July. d/ Production year beginning April. e/ Production year beginning August. f/ Office estimate. g/ Total production of all butter amounted to 70,106,000 pounds in 1944. h/ Quarterly figures represent production of all butter. i/ 1944 and 1945 figures are unofficial estimates and are subject to revision. j/ Factory cheese. k/ Total cheese, and includes cheese made from milk of sheep and goats. l/ Includes farm cheese. m/ Less than a 5-year average. n/ Total dried whole milk and dried skim milk for human consumption. o/ For 1938 only. p/ Not available. Quantity small.

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